

Pivot Cheat Sheet

Two Ways to Easily Search for Opportunities

1. By Profile
2. By Funding

Search by Your Profile

1. Click on Profiles in the top nav bar
2. Type your name in the search window
3. Select yourself from the results list
4. Click on Funding Opportunities link under Funding Matches on right side of screen
5. Review the titles of possible opportunities and click on any title of interest.
6. You can refine the search using the links on the left side (e.g., to see only Research opportunities, click on RESEARCH under Top funding types).

Search by Funding

1. Click on Funding in the top nav bar
2. You can search by text or by sponsor.
3. If you are searching for a particular RFA and you know the number, enter that in the Search window while Search by text is highlighted.
4. Otherwise, click Advanced Search to enter terms of interest.
5. Enter terms for searching and note that it is a Boolean search engine. You can exclude opportunities from your search as well.

Collaborating & Sharing Opportunities

1. When there is a record of interest, select it by clicking on the title and that will bring up the Pivot record.
2. On the right side of the screen, you will see Potential Collaborators. You can click on that to see who else at Duke might be a match for the opportunity.
3. You can share the opportunity with a colleague by clicking on the SHARE link on the top right.
4. You can also track the opportunity so that you can email notifications of changes to the record.

Tracking Opportunities

1. By clicking the HOME button the nav bar, you will pull up a screen with any tracked opportunities you have.
2. From there, you can click on Options to manage those opportunities, change status and notifications, etc.

Help and Training

1. Click on Support/Help at the bottom of the page
2. View Tutorials, FAQ pages
3. Contact Anastasia Maddox (amm39@duke.edu) in ORS for one-on-one or monthly group training opportunities